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ABSTRACT

The Vocational Assessment of Special Needs Individuals Project originated with the regional vocational schools and educational collaboratives of the Assabet and Blackstone Valleys cooperating to determine a meaningful process through which vocational assessment information could be collected, organized, and used in formulating a basis for conceptual model components. This report describes the development of an operational focus for the assessment process, and the sequencing of activities and products necessary to prepare that focus for later field test and replication within other educational settings in The Commonwealth of Massachusetts. Each product is briefly described to provide the reader with the necessary information to ascertain purpose and utilization. The final portion of the report offers evaluative feedback regarding the pilot test of the assessment process, with recommendations for Phase III field test and expansion of the project focus. (Author/RL)

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VOCATIONAL ASSESSMENT

FOR

SPECIAL NEEDS INDIVIDUALS

PROJECT

FINAL REPORT

PHASE II

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L.E.A.

Blackstone Valley Regional
Vocational School District
Upton, Massachusetts 01458

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1980

TM 810 042

VOCATIONAL ASSESSMENT OF SPECIAL NEEDS INDIVIDUALS PROJECT

FINAL REPORT

PHASE II

Prepared by:

Robert A. Stodden, Ph.D.

for

502.9 Task Group

Blackstone Valley Regional
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VOCATIONAL ASSESSMENT

FOR

SPECIAL NEEDS INDIVIDUALS

PROJECT

PHASE II

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INTRODUCTION

I. Project Background (Phase I)

The Vocational Assessment of Special Needs Individuals project originated with the regional vocational schools and educational collaboratives of the Assabet and Blackstone Valleys cooperating to determine a meaningful process through which to collect vocational assessment information as mandated through 502.9 prototypes in Chapter 766. During Phase I of the project, an intensive search was conducted to ascertain the present "state of the art" of vocational assessment of special needs individuals. Information was collected regarding the structure of existing assessment programs, the instrumentation and systems used to collect data, and research as to effectiveness of current procedures implemented with special needs students. The collected information and data was organized within a three-tier storage and retrieval system for use in the process of formulating a basis for conceptual model components.

A basis for a conceptual model was presented for reaction and structural development at a two day model building conference held in January, 1980. Workshop participants included key staff and personnel from participating schools within the Assabet and Blackstone Valley regions, as well as contributing persons from programs throughout the state. Participants reacted to the model structure and provided valuable input into the development and operational focus of the model components. Activities and input from the model building conference were published for all participants in a workshop report (Stodden, 1980, a.) with further development and recommendations for operationalization presented in a project Phase I report (Stodden, 1980, b.).

II. Overview of Project (Phase II)

Phase II of the Vocational Assessment Project was funded with a desire to establish an operational focus for the conceptual model developed in Phase I. Further concern was for initial set-up and pilot testing of the various model components; to include the hiring of staff, inservicing of participants, and the

establishment of a process of continuance and infusion within the local educational and community settings. The activities of the project were performed as contracted services within a time frame beginning April 1, 1980 and ending September 30, 1980. The developmental activities of the project resulted in the following services and products:

1. A comprehensive needs assessment procedure and instrumentation to ascertain the capability and needs of an educational setting to conduct vocational assessments of special needs individuals.
2. The completion of a comprehensive needs assessment of eight schools (grades 7-12) in the Assabet region and twelve schools (grades 7-12) in the Blackstone Valley region to define the means of, and level of participation for different schools.
3. The establishment of a developmental focus of operation to reflect the basic considerations and structure conceptualized within Phase I of the project.
4. The establishment and facilitation of appropriate linkages and levels of communication with key district and on-site school personnel participating within the assessment process.
5. The selection of schools and assessment teams to participate within the initial pilot test phase of the set-up project.
6. The hiring of project staff and transitionalizing to an on-site office within the Assabet and Blackstone regions.
7. The development of an inservice process for project staff to use with in-school assessment teams.
8. The development of situational assessment packets, with coordinated instrumentation and data formating procedures, to be used in existing curriculum areas at the seventh and eighth grade levels.
9. The development of a formal inservice package to train other assessment teams to initiate and participate within the assessment process.
10. The development of a procedural manual to assist school personnel with the planning and implementation of a vocational assessment process within their setting.

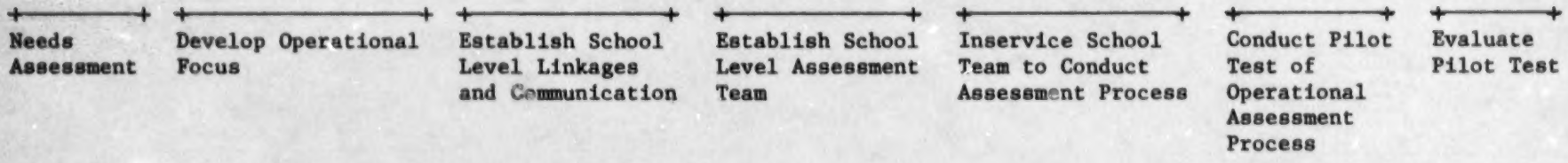
11. The completion of a pilot test of the operationalized assessment process within two schools in the Assabet and Blackstone regions. An evaluation of the pilot test findings was completed to make necessary adjustments and revisions before more extensive field testing.

12. The completion of a proposal for funding to continue replication and field testing of the assessment process through the October 1, 1980 - September 30, 1981 project year.

Phase II of the project has occurred as an intense time of formulation, set-up, training, and pilot testing of a relatively efficient and valid assessment process. Several materials and procedures, developed as a part of Phase II of the vocational assessment project, have been structured as formal documents for use by others concerned with the vocational assessment of students with special needs. This report will provide a short summary of each formal project material, with a reference for those who wish to obtain or review the complete document.

FIGUPE I

INTERFACE OF PROJECT PRODUCTS


Needs Assessment
Develop Operational Focus
Establish School Level Linkages and Communication
Establish School Level Assessment Team
Inservice School Team to Conduct Assessment Process
Conduct Pilot Test of Operational Assessment Process
Evaluate Pilot Test

Project Tasks & Products

1. OPERATIONAL MANUAL
2. TEAM INSERVICE PACKAGE
3. CONDUCT NEEDS SURVEY
4. ASSESSMENT PACKETS
5. CONDUCT PILOT TEST
6. RECRUIT & INSERVICE ON-SITE PROJECT STAFF
7. COMPLETE PHASE III PROPOSAL FOR PROJECT FIELD TEST CONTINUATION

III. Description of Final Report

A. Purposes

A general function of this document is to summarize the various components and events, bringing closure to activities and products making up Phase II of the project. Specific purposes of this report are to:

1. describe the operational focus established for the initial set-up of the vocational assessment process.
2. provide a summary description of products that were developed as a part of Phase II of this project.
3. present summary information and feedback concerning a short pilot test of the developed vocational assessment process.
4. recognize the individuals who participated in the completion of Phase II of this project.

B. Format

This report is structured to efficiently provide a summary description of project, (Phase II), activities and products for the members of the 502.9 Task Group of the Assabet and Blackstone Valley regions. The report will describe the development of an operational focus for the assessment process and the sequencing of activities and products necessary to prepare that focus for later field test and replication within other educational settings in The Commonwealth of Massachusetts. Each product will be briefly described to provide the reader with the necessary information to ascertain purpose and utilization. The final portion of the report will offer evaluative feedback regarding the pilot test of the assessment process with recommendations for Phase III field test and expansion of the project focus.

AN OPERATIONAL FOCUS

The vocational assessment process, as conceptualized in Phase I of this project, is a three component process functioning to yield situational assessment information within a variety of educational and work settings. The general structure and basic considerations underlying the model components provide the following guidelines to begin operationalizing the conceptualized process:

1. That the collection of vocational information is an outcome of the student's career development and educational programming.
2. That the collection of vocational information is a developmental growth process for the special needs learner, taking place within a variety of educational and work settings.
3. That existing education and work settings are presently available, with technology and staff, to yield a vast amount of vocational information.
4. That several individuals participating within, and optional to the student's regular educational program, can contribute in an efficient and valid manner to the developmental process of collecting vocational assessment information.
5. That the needs of the individual and the World of Work will contribute to decisions regarding operationalizing of options that might contribute vocational information.

These guidelines are contributing factors to the development of an operational focus for the vocational assessment process. They contain direct implications for determination of specific assessment settings, method, time frame, participating roles, and information to be collected. Other considerations relate to local service provider needs, such as the potential for long term cost effectiveness and the appropriateness of the operational focus in meeting legal and educational concerns within the community.

In determining the operational focus for Phase II of the Vocational Assessment Project, a systematic approach was developed to maximize utilization of existing resources and assessment options. The approach included a comprehensive needs

assessment of participating schools to determine available resources that might be structured within assessment situations. The needs assessment also provided valuable information necessary to infuse the assessment process such as numbers of students, modes for delivery of services, and material and human resource patterns. Decisions regarding the operational focus were based upon a systematic relationship between determined needs and resources for each setting, and the basic considerations underlying the assessment process.

The following is a listing of parameters which make up the operational focus for implementing the vocational assessment model:

1. To facilitate the student's option of possible entry into a vocational skill training program at the ninth grade level. The assessment process should be initiated during the early junior high school years,

2. The length of time that assessment data would be collected is determined by the developmental decision making needs of the student and the team program developers. Students with more severe disabilities may need more extensive readiness activities or more indepth assessment on certain tasks.

3. The least restrictive, most efficient and valid settings to collect vocational information exist within the student's normal program of activity. Such settings include curriculum areas within academic classrooms, industrial arts shops, resource rooms, existing work sites within the school, cooperative education programs, vocational skill training programs, and community-based work sites. Figures II and III illustrate the developmental structuring of assessment situations to meed the needs of a student as movement occurs through the assessment process.

FIGURE II

ASSESSMENT FOCUS

Structuring of Assessment Situations Which Will Developmentally Yield Information About The Student In Relation To The World Of Work

I	II	III
INITIAL FOCUS	SECONDARY FOCUS	THIRD FOCUS
Curriculum Areas with the Student's Normal Delivery of Educational Services	Work Roles and Sites That Make Up the Normal Operation of an Educational Facility	Work Roles and Sites Within the Local Community
→	→	→

DEVELOPMENTAL COLLECTION OF INFORMATION

English	Business Services	Community Needs as Determined Through a Market Analysis
Math	Maintenance	
Social Studies	Food Services	
Science	Human Services	
Art	Building Repair	
Music	Vocational Training Program	
Industrial Arts	Community Programs	
Homes Economics		
Physical Education		
Extracurricular		

FIGURE III

ASSESSMENT PROCESS

(Initial Project Focus I)

1. Identify Assessment Situations Within Junior High School Curriculum Areas

2. Conduct a Task Analysis of the Identified Curriculum Areas Which will Yield Occupational Assessment Information

3. Define Skills and Behaviors Within the Assessment Situation Which Are Related to the World of Work (General Occupational and Specific Work Role Traits)

4. Design Instrumentation to Systematically Collect Information From the Assessment Situation

5. Implement the Curriculum Activity, Observe the Student Performance of Applied Skills and Behaviors, and Collect Data

6. Format and Evaluate the Collected Information for Use by Decision Makers and Service Providers

4. Structured learning situations within curriculum units will yield skills and behaviors indirectly and directly related to worker behaviors, traits and skills found in an array of occupational groupings

5. The collection of occupational information occurs as the student performs structured tasks within several curriculum areas and work settings, collaborating and expanding initial baseline readiness data toward a decision making point.

6. The collection of occupational information will occur through systematic, critical observation and structured rating by persons conducting or supervising the task to be performed.

7. Vocational information collected in newly structured existing settings must be monitored and formated for use in team decision meetings. This role often falls with the Educational Team Leader (ETL).

In operationalizing the initial project focus, a prime function of staff members was to establish and facilitate communication and linkage among and within the targeted schools. This function was critical because of the desire to infuse the vocational assessment process within the present staffing and programming structure. Clear communication and support at all levels within the educational facility was necessary to access and utilize existing situations that would yield assessment information. Other specific roles of the project staff in operationalizing the initial focus included:

1. The definition and establishment of inschool assessment teams consisting of teachers and other key personnel who would participate in the vocational data collection process.

2. Conduct intensive inservice activities with inschool assessment teams and other related persons interacting with the vocational assessment process.

3. Assist assessment teams with the analysis and structuring of assessment situations within curriculum units.

4. Assist the process of relating skills and behaviors within the assessment situation to skills and behaviors required in work roles reflective of occupational groupings.

5. Design instrumentation to collect desired occupation information from

within the structured assessment situations.

6. Assist teachers and others to build occupationally related applied outcomes into their assessment situations.

7. Provide commercial materials for use in curriculum areas needing assistance in relating their assessment situations to occupational clusters or designing tasks with applied performance outcomes.

8. Structure the role of the team leader or ETL person to coordinate and format the collected information for use by team decision makers and potential service providers.

9. Supervise and conduct a short pilot test run of the operationalized data collection process, providing assistance and feedback for further development and field test.

The steps for operationalizing the initial focus of the vocational assessment process are developmental steps that will apply, with specific situational input, as guidelines for use in actualizing other assessment focus options as needed. Beneficial outcomes from the implementation of the presented operational focus for vocational assessment include:

1. Long term cost effectiveness by structuring and infusing the vocational assessment process within the existing delivery of educational services.

   a. requires no new permanent facilities, staff members, equipment (supplementary only), allocations, or movement of students into additional programs.

   b. process can be tailored to the needs of local situations (urban or rural) without waste.

   c. involves indepth teacher and staff involvement furthering the probability of long term existence for the program components.

2. Structuring of the vocational assessment situation by teachers and other school staff will assist the infusing of career development and pre-vocational input within the existing curriculum areas. The process provides continual feedback for the restructuring of curriculum areas making the educational process more responsive to the readiness needs of vocational skill training programs and the special needs student.

3. The participation of students within the vocational data collection activities is a developmental learning process where the student increases his/her awareness, learns how to explore, understand, and act upon variables related to participation within the World of Work. The training outcomes from the assessment process will better prepare the special needs student to contribute to the selection of a skill training program or other options of need.

4. The vocational assessment process will provide extensive longitudinal data over several situations that can be collaborated and formated for use by team decision makers to assist with student placement, and by service providers in structuring skill training options for student participation.

FIGURE IV

DEVELOPMENTAL ASSESSMENT

Readiness

Awareness → Divergent Exploration → Integration → Developmental Decisions

Expanding Options

Exploring and Collecting Information Over a Diverse Range of Occupation or Occupational Clusters

Assessment

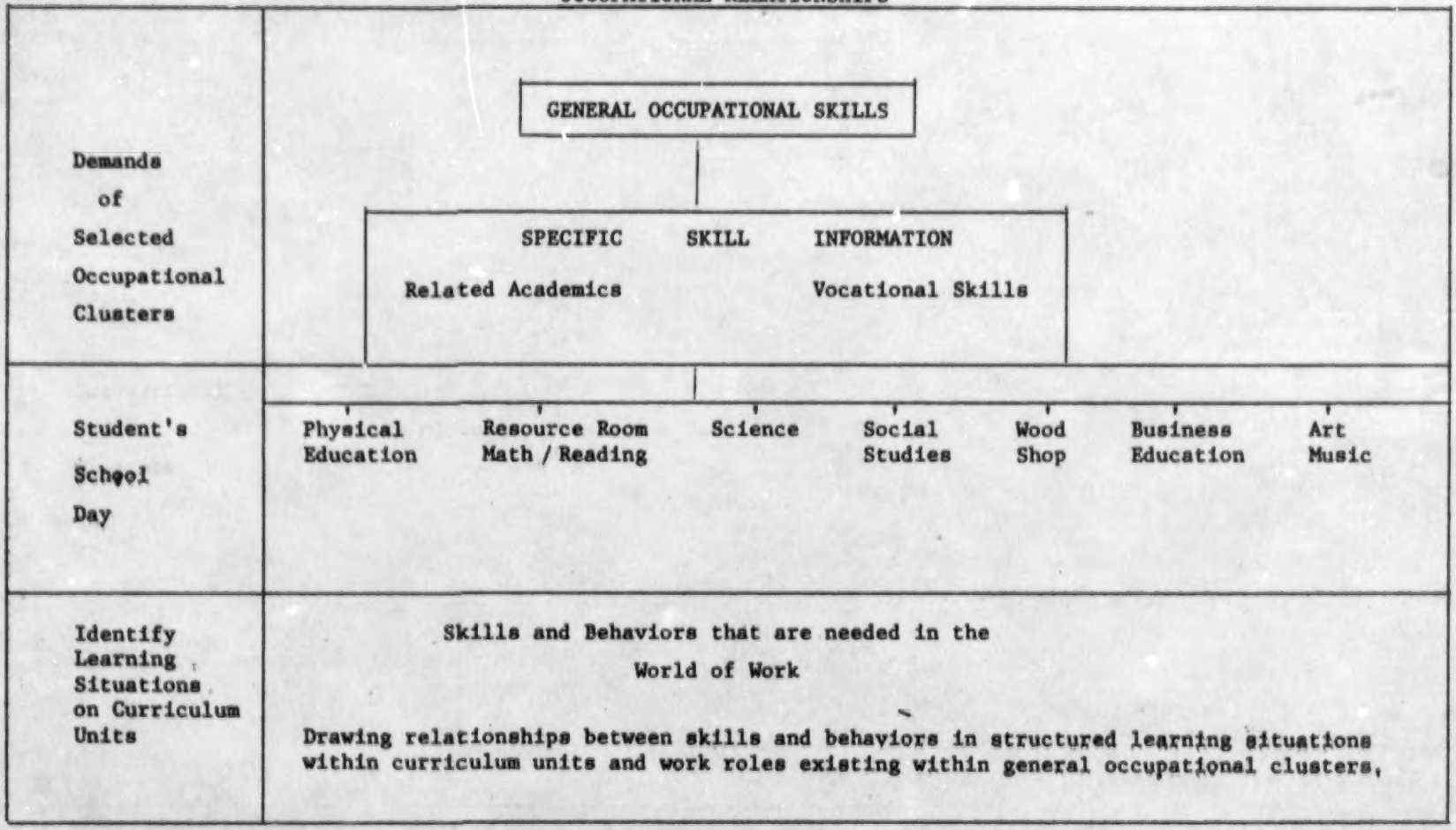
Awareness → Convergent Exploration → Integration → Developmental Decisions

Narrowing & Specifing Options

Exploring and Collecting Information Converging Within Specific Occupation Clusters and Actual Work Role Factors

FIGURE V

OCCUPATIONAL RELATIONSHIPS


Demands of Selected Occupational Clusters
GENERAL OCCUPATIONAL SKILLS
SPECIFIC SKILL INFORMATION
Related Academics
Vocational Skills
Student's School Day
Physical Education
Resource Room Math / Reading
Science
Social Studies
Wood Shop
Business Education
Art Music
Identify Learning Situations on Curriculum Units
Skills and Behaviors that are needed in the World of Work
Drawing relationships between skills and behaviors in structured learning situations within curriculum units and work roles existing within general occupational clusters.

REVIEW OF PROJECT ACTIVITIES AND PRODUCTS

1. Comprehensive Needs Assessment Procedure and Instrumentation
(Product .01 on file with the project office)

A systematic procedure with accompaning data collection instrumentation was developed by project staff to conduct an extensive survey of current linkages and resources present within the Assabet and Blackstone Valley regions. Data collected pertained to individuals, resources, and occurrences related to the potential implementation of the vocational assessment model. The following data collection procedures were implemented:

1. Participating secondary schools (junior high and high school) were identified and key personnel contacted as to the purpose of the project and the surveying process.
2. It was determined that special education directors, counselors, and key administrators would be the initial sources of information (each could select specific others for needed data).
3. Means of collecting information was through telephone contact, written letters, and personal interviews. Also, large amounts of demographic information was collected through town halls, existing school registers, and program bulletins.
4. Information was collected by two persons residing in the Assabet and Blackstone Valleys, both of whom had participated in the delivery of educational services and were familiar with the local schools and administrators.

The parameter for information to be collected, as well as formating for the information, was determined by the survey instrument. (Material .01 on file with project.) The survey instrument was developed through an analysis of information and data necessary to formulate an operational focus for the assessment process. Further collecting of data assisted with concerns to maximize use of existing individuals, programs and resources in implementing the predetermined focus of operation. The need also existed to select pilot test schools, to develop local logistics and to determine geographic considerations for participation of other schools in the project.

The structured survey consisted of the following eleven data collection sections:

1. Central Administrative Office Information
2. Information on Individual Schools, Key Contact Persons and Parent Groups
3. Information on Student Population, Specifically Special Needs Groupings on an Individual School Basis
4. Staffing Patterns
5. Curriculum Areas
6. Resources of a Programmatic and Material Nature
7. Evaluation Team Process by School
8. General School Factors
9. Community Programs
10. Employment Settings
11. Follow-up Information

2. Comprehensive Needs Assessment (Report on the Surveying Process)
(Material .02 on file with the project office)

During April and May, 1980, a comprehensive survey of needs, as related to the delivery of vocational assessment services, was carried out as a part of this project. Information was collected through a systematic procedure and with the use of structured survey instrumentation as described in number 1. The collected information was analyzed and formated for utilization by project staff members. A summary report of the collected survey information, with interpretive statements regarding the meaning of the information, is available through the project office as Material .02.

All data collected from the needs survey instrument is clearly charted in graph format with the identification of schools, totals for categories and comparative percentages indicating size, strength, level of participation and commitment to a range of special services. Comparative information is also provided regarding scheduling, logistics, school layout, and material resources that might contribute to the vocational assessment process. Further demographic and employment information assisted the planning process of implementing Phase II of the project. All statistical information for the twenty surveyed school districts is further analyzed concerning the mean average, range of figures, skewed comparisons and the significance or meaning of the figures.

Information from the comprehensive needs assessment was utilized for some of the following project tasks:

1. To obtain a demographic and geographical perspective of the Assabet and Blackstone Valley areas for logistical planning purposes.
2. To select pilot test schools regarding concerns for access, location, staffing patterns, bilingual and ethnic groups, and present connecting services.
3. To assist with each school's requirements for set-up of the assessment process given individual settings.
4. To allow for maximum use of existing resources in each setting.
5. To access the internal operating procedures of schools and utilize them to set up the vocational assessment process.
6. To assist long rang planning and decisions as the project enters Phase III field test tasks.

3. Establishment and Facilitation of Linkage and Levels of Communication, Identification and Linkage.

Efforts were pursued at all levels of administration and instruction for the two pilot set-up schools. The project and its specific focus were presented and explained, from an appropriate frame of reference, to the following administration and instructional staffing levels:

a. School Committee Presentation and Clearance
b. District Superintendents
c. School Level Administrators
d. Special Service Personnel (Counselors, etc.)
e. Special Needs, Industrial Arts, and Vocational Personnel
f. Academic Teachers, Extracurricular Staff
g. Parents and Students

Support and commitment was obtained at each level for the two school systems with plans for maintaining appropriate levels of communication with each staffing area. The following is a list of important guidelines developed to assist the process of establishing and maintaining the key linkages necessary for the project function:

1. The active assistance of key project task force members to assist with contact and communication. (The help of Mr. Perry Davis and Mr. Ray Budde was invaluable as to the understanding of local lines of communication and the originating of key contacts.)

2. Identification of and access to key people at all levels within the school and community to establish a base of understanding and support.

3. Keeping all key persons informed ahead of time and making adjustments as needed to fit local circumstances.

4. Being able to clearly describe the project's purposes and functions, from the listener's frame of reference. There is a need to directly address roles to be played, funds needed, and outcomes to be received with school personnel.

A complete listing of considerations for establishing and maintaining project linkages are available in the Vocational Assessment Procedural Manual (Project Material .03).

4. Selection of Pilot Test Schools and Assessment Teams

One middle school was selected in each of the two regions participating within the Vocational Assessment Project as a pilot test school. The Northborough Middle School was selected within the Assabet region and Milford Middle School was selected within the Blackstone Valley region. The following determinants were used in the selection process of pilot schools:

a. geographic location within the region.

b. feedback from task force members and program specialists conducting the needs survey.

c. numbers of students with special needs and programming options available for those students.

d. numbers of students mainstreamed in the participating schools.

e. level of interest by top level administrators to participate in the project.

f. interest of special education personnel in the project and how it could assist their school.

Within each of the participating pilot schools, efforts were made to formulate a team of representative instructional personnel and key decision making persons to function within the team evaluation process. The purpose of the assessment teams was to assist project staff in the development of structured assessment situations, with instrumentation, for units within their curriculum areas. The team members provided structured feedback toward the development of the assessments, logistical information to assist with planning for collection of the assessment information, and participation in a short pilot test during September, 1980. A total of 16 team members were identified (selection was assisted by the school core team liaison (CTL) person) (9 from Northborough and 7 from Milford) on the following criteria:

a. interest in the process of vocational assessment and willingness to participate during summer inservice sessions and September field test times.

b. representation of curriculum areas that would yield structured vocational assessment information. (Counselor/CLT, Special Education, Industrial Arts, functional academic areas, homemaking, art, music, and science.)

Starting the second week in June, 1980, team members began initial inservice work on the identification and analysis of assessment situations. As assessment situational packets and instrumentations were developed over the summer, the team members met for structured inservice, review, and feedback sessions one full day per month. During the second and third weeks of September (students were back in the classroom), the team members participated in a pilot test of the developed assessment packets assisting with evaluative feedback. (Team members were paid a $300 stipend for their participation with the project during the summer months.)

5. Selection of On-Site Project Staff and Set-Up of Office

Phase II of the Vocational Assessment Project started on April 1, 1980 with two consultant level staff members in the form of a project director and a data analyst. Other part-time persons were contracted for part-time needed services operating from the project director's professional office. Since the project was moving to a full-time direct service status, it was decided to transitionalize to an on-site office within the Assabet-Blackstone Valley region and hire a full-time direct service staff.

Through the assistance of Mr. Perry Davis and the Northborough School District,

the project obtained permission to rent classroom space at the Peaslee School on Maple Street in Northborough, MA. The on-site office was furnished and readied for staffing during July, 1980.

During the first month of Phase II of the project, plans were made to recruit full-time staff members for the direct service work of completion and field test of project products. A recruitment effort of newspaper advertisements, postings, and extensive help from task group members yielded a grouping of high level applicants for the positions of Project Manager, Assessment Specialist, two Program Specialists, an Inservice Designer, and Administrative Secretary. (Job descriptions for each position are on file with the project.) The hiring of project staff was followed by a period of inservice orientation during which time staff members became acquainted with the conceptual basis for the project as well as roles within the operational focus to be developed during Phase II. All project on-site staff members were on the job by July 15, 1980.

6. Inservice Package for Assessment Team Members

(Project Product .04 on file with the project office)

The inservice package for assessment team members is designed to provide skill training regarding the vocational assessment process used with special needs students. Activities within the inservice training package sensitize individuals to the purposes of infusing vocational assessment into the educational curriculum, and provide instruction on how to conduct a curriculum analysis, develop checklists, and collect information on students. The inservice package is composed of three separate, yet developmental, training sections including; Part I, Sensitization, Part II, Curriculum Analysis, Part III, Developing Checklists and Collecting Information. Each section consists of approximately six hours of training for a total of three or more inservice days. A summary of the objectives for each in-service section is as follows:

OBJECTIVES OF PART I: SENSITIZATION

The overall purpose of Part I: Sensitization is to introduce participants to vocational assessment as a process that can take place within the classroom, and the teacher's role in the assessment process. More specifically, the objectives are as follows:

1. Assessment is not limited to paper and pencil tests.
2. Assessment can take place within the classroom (embedded vs. isolated setting.)
3. Existing curriculum areas are a source of vocational information on students that can be used for making decisions about their (students) preparation for the World of Work.
4. The most normal, least restrictive setting is the most valid, efficient place to collect information in terms of content and costs. (Embedded vs. isolated setting, objective #1.)
5. The teacher is in a position to be able to efficiently collect the most valid information on the student.
6. How a student performs on a task is more important than the knowledge.
7. Observational information is a critical part of the assessment process.

OBJECTIVES OF PART II: CURRICULUM ANALYSIS

The overall purpose of Part II: Curriculum Analysis is for participants to be able to analyze a learning situation (unit of study) in their classroom, to understand the difference between knowledge outcomes and applied outcomes, and to see the relationship between content steps of a learning situation and skills and behaviors in the World of Work.

More specifically, the objectives of Part II are as follows:

1. Define a specific piece of instruction in terms of content (ex. Science: Series Circuits; Social Studies: Map Reading; Math: Fractional Measuring with a Ruler) and time (ex. 1 day, 1 week, 1 4-day unit).
2. Understand and demonstrate the difference between knowledge outcomes and applied outcomes.
3. Participant is able to analyze a learning situation; more specifically, is able to break a learning situation into a) Content/Student's Steps on Task, b) Instructional Strategies, c) Instructor's Roles, and d) Knowledge or Applied Outcomes. These are the steps involved in a Curriculum Analysis.
4. An awareness of the relationship between content steps on a task (learning situation) and skills and behaviors in the World of Work.
5. Participant will complete a Curriculum Analysis on a learning task within their curriculum.

OBJECTIVES OF PART III: DEVELOPING CHECKLISTS AND COLLECTING INFORMATION

The purpose of Part III: Developing Checklists and Collecting Information is to show participants how occupational information can be derived from classroom situations. More specifically, how the curriculum analysis developed in Part II can be used to develop checklists that measure task performance, work adjustment factors and occupation relationships. The objectives in this workshop include:

1. To understand that the vocational assessment process involves the use of critical observation of selected factors in the classroom.
2. To understand, develop and use the Task Performance Checklist.
3. To understand the need for and practice critical observation skills.
4. To understand the importance of, develop and use an Interest Checklist.
5. To understand the importance of, develop and use a Temperament Checklist.
6. To understand the importance of, develop and use a Situational Task Behavior Checklist.
7. To understand and use a General Work Readiness Checklist.
8. To understand the importance of, develop and use occupation relationship checklists including academic skills, perceptual-motor skills, and physical demands checklists.
9. To have an understanding of how the information from these checklists can be used and how these checklists provide a "whole" picture of the student in relation to the World of Work.

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7. Situational Assessment Packets with Instrumentation and Data Formating Procedures (Project product .05 on file with the project office)

The basis for the assessment process in this project is that structured situations within curriculum areas will yield vocational information (skill and behavioral) that has a direct and indirect relationship to occupational areas in the World of Work. Thus, with the assistance of school assessment teams, seven situations were identified and analyzed regarding the following variables:

a. Content/Steps the student follows to complete the task.

b. Instructional Strategy used by the teacher to carry out the lesson.

c. Role of the teacher while carrying out the lesson.

d. Outcomes or Applied Skills the student will possess at completion of the lesson.

Upon completion of an analysis of the assessment situation, it is possible to identify several sets of skills and behaviors related to the task to be performed. These work related skills and behaviors can be grouped into categories such as:

Work Adjustment

- Situational behaviors the student will need to perform the specific task assigned.
- General work readiness behaviors needed to function in a work site or learning environment.
- Work interests and temperaments.

Specific Skills and Behaviors Related to Occupational Areas

- Individual occupational characteristics required to adequately perform the specific task assigned such as, perceptual/motor, academic skills, physical demands, and cognitive skills.
- Basic skills in the task that have a direct relationship to an occupational area.

The information is collected on structured rating instrumentation, through critical observation, by teachers or staff persons supervising the student's performance on the task. Norming criteria for rating performance on the task is

directly related to classroom performance of students doing the task. Evaluation of a completed rating form should reveal whether the student was able to complete the task, in which areas the student needed assistance, or if and what abilities and characteristics he/she possessed to complete the task or other related tasks of a similar complexity.

Occupational relationships can be established directly for each of the assessment packets through use of any existing exploratory guide such as:

a. 15 USOE Occupational Clusters

b. Guide to Occupational Exploration

c. Dictionary of Occupational Titles, 4th Edition

d. Occupational Outlook Handbook

8. Procedural Manual for Implementing the Vocational Assessment Process
(Project material .03 on file with project office)

The procedural manual is a developmental accounting of steps and procedures undertaken in the operationalization of the conceptual vocational assessment model formulated during Phase I of the project. The basic structure of the manual has been formulated with the remaining parts to be completed as the project focus is field tested during Phases III and IV. The purpose of the procedural manual is to assist other school personnel to plan, develop, and implement a vocational assessment process for special needs students. The intended audience is administrators, special education directors, counselors and others who are interested in designing a vocational assessment process which maximizes use of existing resources within their educational or community setting. The manual is structured to allow for use of the present operational focus developed with this project, yet it is possible to consider local needs in planning a focus that might better fit the purposes and logistics of a different setting. Also, the manual may be used in conjunction with other Phase II products for a more complete delivery of service guidelines (assessment packets, inservice package, survey instrumentation, and Phase I and II project reports).

The procedural manual is developmentally structured into three general sections reflective of the stages of progress through Phase II of this project.

The three sections are structured as follows:

I. Introduction

- Purposes, basis for an approach, developing a conceptual model.

II. Administration Planning and Preparation

- Discussion of steps necessary for planning an approach for implementing a vocational assessment program.
- How to establish a need, purpose, rationale to sell the program; where to find support for a program design.
- How to identify school and community resources.
- Building an operational focus to meet local needs.
- Involving appropriate persons and obtaining and maintaining levels of support.

III. Developmental Phase

- How to address the developmental steps and tasks necessary to set up and carry out the vocational assessment process.
- Recruitment of staff, planning and scheduling inservice, carrying out inservice activities, and conducting a pilot test of the developed assessment process.

The procedural manual is structured to allow other professionals wishing to replicate all or parts of the present vocational assessment process to make use of the developed assessment packets and the structured inservice package, as their needs may dictate. For a complete understanding of the process to be replicated, it will be necessary to access all of the project products as well as reports for Phase I of the project. Also, as this project moves into Phase III and begins to field test and expand the basic focus, the procedural manual will become a more complete and meaningful guide.

9. Completed Proposal for Funding of Phase III Continuation
(Project material .06 on file with project office)

A proposal for continuation of funding for Phase III of the Vocational Assessment Project (expansion of operational focus and the collection of field test data) was completed and submitted to the Department of Education on July 15,

1980. Emphasis in the Phase III proposal is on (1) expanding the developmental tasks and operational focus developed in Phase II, to include several other schools in the Assabet and Blackstone Valley areas; (2) within a structured research design, to collect field based information to ascertain validity and reliability figures on basic components of the assessment process; (3) to further refine and develop a formating and profiling process to maximize use of collected information; (4) to communicate with other assessment projects, assisting their data collection process.

The submitted proposal was reviewed by The Division of Special Education. Due to conflicts concerning the contracting of full-time employee staff through the Blackstone Valley Vocational School LEA, it was decided that the state Department of Education would supervise the project employing staff members on 03 contracts. The funded Phase III proposal is to carry the project from October 1, 1980 through September 30, 1981.

10. Pilot Test of the Operationalized Vocational Assessment Process

During the last two weeks of September, 1980, a pilot test of the vocational assessment process was conducted by assessment team personnel who had participated in team meetings during the summer. The pilot test was completed with assessment packets and instrumentation developed during Phase II to work out logistical problems and gain practical insight into the functioning of the data collection process. The two pilot schools, Northborough Middle School and Milford Middle School, participated at levels indicated by the following structured information reprinted from product document, Instrumentation for Situational Assessment, "Field Trial Results".

OVERVIEW OF FIRST TRIAL

Northborough Middle School

Subject Areas	Classes	Teachers	Number of Students in Class
Fine Arts: "Drawing in Perspective"	4	1	54 (4) (11) (21) (18)
Home Economics: "Making a Pancake"	2	1	22 (10) (12)
Industrial Arts: "Three-View Drawing"	2	2	21 (15) (6)
Music: "Music as a Means of Communication"	4	1	55 (10) (4) (20) (21)
Social Studies: "States and Capitals"	1	1	25
	13	6	177

Student Population:	F.A.	Ho. Ec.	Ind. A.	Music	Soc. St.
7th Grade					
1. Girl	X	X		X	
2. Boy	X	X		X	
3. Girl	X		X	X	
4. Boy	X		X	X	
8th Grade					
1. Boy					X

Total Observations by Project Staff 14
(Students were observed at least once in each class site)

OVERVIEW OF FIRST TRIAL

Milford Middle School

Subject Areas	Classes	Teachers	Number of Students in Class
Industrial Arts: " Making a Custom Coat Hanger	1	1	4
Math: "Metric System"	1	1	14
Science: "Electrical Series Circuit"	1	1	13
	3	3	21

Student Poplation	Industrial Arts	Math	Science
7th Grade			
1. boy		x	x
2, boy		x	x
8th Grade			
3. boy	x		

Total observations by project staff 5
(two students were observed in two different class sites)

FIELD TRIAL RESULTS

1. That curriculums can be analyzed and subjected to a task analysis (chart 4).

Two project staff members were able to observe approximately seventy-five percent of the presentations of the nine lessons during the first trial. Their responsibility was to observe and record deviations in the presentation and the written curriculum analyses. All nine lesson units totalled one hundred and ten (110) steps. Of the ten discrepancies, between the curriculum analyses and lesson presentation, five were due to omitting the step involved. The remaining disrepancies resulted from a difference between the step presented and the step as it was written in the curriculum analysis.

Implications

The results indicate that through curriculum analysis, a lesson unit can be constructed as a task analysis and can be standardized for purposes of measurement. The key factor in using curriculum analysis as a process is dependent upon in-service training in order to insure reliability.

2. That occupational characteristics can be factored out from a task analysis.

That occupational factors can be identified through task analysis has been established prior to this project (i.e. U.S. Department of Labor research since 1933). However, its application to classroom areas is relatively new. Many of the factors are more readily identifiable than others. Verbal and numerical skills are fairly well stated. Perceptual/motor skills can be identified, but levels of perceptual/motor skills required in a given task are not easily measured. It was possible to identify the perceptual/motor skills involved in a task and indications of difficulty, on the part of the student, were observable.

Implications

Verbal and numerical skills in lesson units can be identified and level of skill can be measured. Perceptual/motor skills can be identified, but further research is necessary if the level of skill is to become measurable.

3. That a classroom teacher can carry out a task analysis, as it is constructed, without any distortion of the factors involved (chart 4).

In all of the one hundred and ten (110) steps of the nine (9) lesson units,

six hundred and eighty-two (682) factors were identified. Of the ten discrepancies between the curriculum analysis and the lesson units, five steps were omitted. In the case of the omissions, the factors were not distorted because they did not occur and, therefore, were not observed. In the case of the "Student Action Changed" in "Making a Pancake", liquid shortening was substituted for solid shortening, eliminating one step. In only one instance were factors distorted. In this case, the original instructions were to write down words heard on a record (Music), but the action performed was reading the words - changing the factors from Verbal-listening and writing to Verbal-reading and writing.

Implications

Once a curriculum analysis had been done and occupational factors analyzed, the nine teachers were able to conduct thé lesson unit as a standardized task performance without distortion of the factors involved.

4. That teachers can identify occupational characteristics through critical observations of a student's performance (chart 5).

One or more of seventeen factors (Cognitive Skills, Perceptual/Motor Skills, and Physical Demands) occurred in each lesson unit and are marked with an "X" accordingly on the chart. There was an opportunity to match the rating of the observer to that of the teacher for each factor in one hundred and sixty-five (165) cases. Twelve discrepancies occurred as follows:

General	-	three discrepancies out of seventeen
Verbal	-	four discrepancies out of seventeen
Perceptual/Motor	-	one discrepancy out of forty-nine
Physical Demands*	-	four discrepancies out of sixty-eight

Implications

The results demonstrate that once teachers know the functional definitions of occupational characteristics, they demonstrate a high degree of accuracy in identifying the factors involved in performing the task. The format used in this section would appear to lend itself to analyzing the factors most likely to occur in a given curriculum area. Over time, data should be collected to determine if a curriculum area has its own pattern of occupational characteristics.

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* All four discrepancies occurred in one lesson unit and were behaviors rather than inability to meet physical demands.

5. That information based on a student's performance will correlate with other testing sources (chart 6).

The areas of difficulty identified in the classroom through situational assessment have been correlated with I.E.P Profiles and one or more of the following testing instruments:

California Achievement Test
Wide Range Achievement Test
Standard Achievement Test

In the case of each student, the most recent testing results were used and were obtained within four months prior to the situational assessment.

There was a strong correlation between the I.E.P. profiles and the testing results, and difficulties in those areas were observable and measurable in the situational assessments. However, areas of difficulty were observable in the situational assessments which were not identified in testing, and were not identified in the I.E.P. profile. In six cases, perceptual/motor skills were identified as the factor involved and only once was the perceptual/motor factor indicated in the I.E.P. profiles for all the students observed.

In the cases where the California Achievement Test indicated difficulty in verbal expression, the student demonstrated the same difficulty in the situational assessment. In the cases where the student was not given the California Achievement Test, it was difficult to determine whether the student's difficulty in verbal expression was the result of verbal skills or behaviors.

Implications

It would appear that wherever testing results are available, the I.E.P. profile is based on testing results and not student performance. Where no testing information is available, there is the possibility that the area of difficulty will not be identified in the I.E.P. It would appear that the situational assessment approach and testing results complement each other and further, that the I.E.P. should be developed using both as sources of information.

Observation of Behaviors

Assessing behaviors proved to be the most difficult for the participants (see Chart 7). Identifying the behaviors involved resulted in more discrepancies, between the participants and project staff observations, than occurred with the observations of other occupational characteristics. This may have been partly due to the format of the data collection instrument. The subsequent assessment instrument for observation of behaviors has been designed to enable the observer to focus on three areas: approach to task, relationship to task environment, and production. The three categories are defined by twelve general work readiness behaviors.

It was also apparent that recording the number of times that a specific behavior occurred was difficult to handle if done by the participant while teaching. Further trials may indicate that it would be preferable for another staff member to act as a recorder where rating is appropriate or necessary.

Also, it is evident from both the ratings and observations of the project staff, that the degree of inappropriateness of behaviors, as seen by the participants, varies from one teacher to another and from one class-site to another. This field trial indicates a need to make observations of behaviors a more objective process and to focus on the relationship of behaviors to the task.

In comparing the behaviors observed, and the behavioral objectives in the I.E.P., it is apparent that, in most cases, social interaction is emphasized. Although the observations indicated significant problems in approaching the task on the part of one student, and significant problems with production on the part of others, they were not stated in the I.E.P.

Implications:

The importance of developing critical work related behaviors, as part of the readiness stage, is obvious. Two out of the three areas used in this process, (approach to task and production), receive little attention in the I.E.P, although these areas would be critical to job performance. A need exists to train people to observe and rate behaviors objectively by focusing on the effect of behaviors on the outcomes of task performance.

Interests:

Interests and temperaments, and their relationship to occupational clusters,

were areas with which the participating teachers had little familiarity. Although verbal interaction between the teacher and student was strongly emphasized, some of the participants were uncomfortable in using non-verbal cues in determining whether or not students liked the predominant activities in a lesson unit. Also, teachers were uncomfortable in distinguishing between an interest and a temperament. It was obvious to both project staff observers that both areas revealed significant information about the student.

The field trial results show some indication that each curriculum area represents a distinct pattern of interests (see Chart 8). Further, data from subsequent field trials will be analyzed to determine if, in fact, curriculum areas represent a relationship to interests of various occupational clusters.

There also was some indication that a correlation between interests and cognitive skill levels exists. Students who were observed to have difficulty with verbal-reading skills also indicated a dislike for "activities involving communication of ideas and information (6)" particularly where written information was involved. These same students indicated that they liked working with things and objects, working with methods, processes and machines, and working on activities resulting in tangible production and satisfaction (see Chart 9). Again, subsequent field trial results will be analyzed to see if this trend continues.

It is further evident, from the field trial results, that the participating teachers in some cases either did not rate interests or temperaments or did not engage in verbal interaction with the students. None of the participating teachers made any reference to "Direct Relationship of the Task to Occupational Clusters".

Implications:

The process of determining the relationship of interests to occupational clusters is an important part of general assessment. The general curriculum areas potentially have significant implications for the development of a particular pattern of interests on the part of students and provide significant insights into a student's performance. There is an indication that a range of curriculum areas have a variety of interest configurations which would be significant for general assessment.

Temperaments:

Participating teachers had difficulty distinguishing between interests and temperaments. Some teachers did not attempt to rate temperaments and some teachers

did not attempt verbal interaction with the student. Also, there was confusion between temperaments as an adjustment factor and behaviors which may or may not have a relationship to the ability to adapt to a particular situation. This area needs to be followed up in subsequent field trials.

There was some indication that the total learning environment of the student emphasized some temperaments over others (see Chart 10). "Making judgements based on criteria which can be measured and checked (8)" and "Situations requiring attainment of precision according to set limits, standards or telerances (10)" were the predominant temperaments in seven of the nine curriculum areas. Work of a repetitive nature (2) also was a predominant temperament in five of the nine areas.

There is an indication that much of the learning environment of a student is structured and that a demand for accuracy as well as performing against a measurable criteria pervades most of the student's schedule. This has implications for understanding a student's ability to adapt to learning environments and occupational clusters.

There, also, is a strong indication that teachers have an intuitive sensitivity to a student's ability to adapt to the situation within their specific class area. The observation of the process in classrooms indicates that teachers attempt to make adjustments for the student who has difficulty in adapting to different situations.

Implications:

Teachers have little or no training in this area. Also, the field trial results indicate that confusion exists about the relationship of temperaments and behaviors. It is evident, however, that the adaptability factors demonstrated by the student in adjusting to a variety of learning environments is significant in gaining insight into the student's performance.

Conclusions:

1. That the field trial results demonstrate a multitude of relationships between the educational process in public education and the World of Work.
2. That the acquisition of skills in the educational process, which is both developmental and sequential, is directly related to vocational development.
3. That the difficulties which a student has in the educational process represent potential difficulties in vocational development, and, if not remediated, result in restricting occupational choices.
4. That the entire educational process has prevocational implications for the students in areas of skills, interests, temperaments and behaviors.

5. That the student's interests as related to occupational clusters are strongly influenced by the variety of experiences in the overall curriculum of the educational process.

6. That the student's ability to adapt to the learning environment has implications for adaptability to the World of Work.

7. That little evidence exists that school systems draw relationships between the educational process and vocational development.

8. That the interrelationship between vocational development and the educational process is not emphasized either in the academic training or inservice of teachers in public school systems.

9. That the process of developing an I.E.P. already has a direct effect on the outcome of the vocational development of an individual student.

10. That the development of the student's I.E.P. places little emphasis on the student's performance in the educational process itself.

11. That the educational process already has the potential of making a significant and positive impact on the outcome of a student's vocational future.

USE OF INSTRUMENTATION

A questionnaire was developed and given to nine teachers consisting of four areas:

1. Evaluation of Inservice
2. Evaluation of Instrument Process
3. Evaluation of Rating Forms
4. Evaluation of Suggested Instrument Format

1. Although the inservice was generally rated high, one area where a difference of ratings occurred was order of presentation. For some of the participants, the focus of the project was not clear until the third session. Other participants felt that emphasizing the curriculum itself, as the first step, was necessary in order to effectively use the process.

2. The response to two parts of section 2 was unanimous. All teachers felt that the curriculum analysis represented the actual lesson presentation and that the process could be used effectively for all students, regardless of special needs.

In terms of process management, questions b, c, f, and g, of part two indicated positive responses from the majority of teachers. Eight felt that the process did not interfere with lesson presentation. One participant indicated that the process doubled the time the lesson normally would have taken to be completed.

Three teachers indicated that the process did not require additional effort <u>during</u> the lesson presentation. The remaining six teachers indicated that the process did require additional effort for the following reasons:

> "I found myself watching this student more carefully than the others - and making more notes while missing some other students."
>
> "It forced me to evaluate the individual tasks more. Note - this is a positive nature i.e. - it helped me to locate the source of the student's problem faster and get him on the proper course."
>
> "More conscious of looking for students' reactions to information: to instruct clearly and accurately."

"A closer evaluation of the student was made. Also, a one to one relationship was carried on in an attempt to evaluate, to answer the questionnaire."

"Tried to be certain the student participated- had a chance to be involved - observed the student more than usual in order to be able to fill out the checklists."

"In this subject area, a greater amount of time was taken from other students. Also, because of the lesson observed, two periods (non-consecutive) were needed."

Under Part 2, the question of the range of time needed to complete the rating forms was 10 minutes to 2 1/2 hours. It should be noted that the participant taking 2 1/2 hours substituted for another participant and had not been involved in the inservice. The average time of all participants was 45 minutes and the median time was 37 minutes.

Under Part 2, question g, six out of nine participants indicated the process did not take a significant amount of non-classroom time. The remaining three indicated that it did take a significant amount of non-classroom time and gave the following reasons:

"1/2 hour or more which is not that significant with only a few students."

"It was all done after class - at least 45 minutes each."

"2.5 hours."

Under Part 2, question g, which asks if the variables as analyzed were clearly observable, five indicated that they were, two were not sure, and two did not answer. This contrasts sharply with their actual performance which indicates a high capability of identifying occupational characteristics in a student's performance (see chart 5 - Field Trial Results).

3. Under Part 3, seven participants felt the information was stated clearly. Two participants were not sure. One of the two stated, "I am still learning the terms and definitions".

Only one participant had prior diagnostic information about the student being observed. Seven participants had no prior knowledge from a student's I.E.P. One participant was aware of the strengths and weaknesses in the I.E.P.

profile and was aware of suggested modifications. One participant did not answer whether or not information was available.

4. All participants rated the suggested format either 5 or 4. Throughout the trial, they accepted the necessity of the Date Collection Instrument being extensive, but expressed the hope that the final assessment instrument would be shorter and more manageable.

Teacher Questionnaire Results
Evaluation of Assessment Instrument

N=9

I. In-Service	(+) 5	4	3	2	1	(-)	No Answer
a. Content was related	5	2					2
b. Arrangement of presentation	3	3	1				2
c. Preparation to field test	4	1	1				3
d. Relationship of outcome to expectations of field test	6	1					2

II. Process

a. Did the Curriculum Analysis represent the actual lesson presentation?

Yes 9 No ____ Not Sure ____ No Answer ____

If not, cite reasons:

b. Did the process of situational assessment interfere with lesson presentation?

Yes 1 No 8 Not Sure ____

If yes, cite reasons:

c. Did the process result in additional effort during the lesson presentation?

Yes 6 No 3 Not Sure ____ No Answer ____

If so, explain to what extent:

d. Were the variables analyzed,as present in the lesson unit, clearly observable as defined in the packet?

Yes 5 No ____ Not Sure 2 No Answer 2

If not, list which variables were not clearly observable:

e. Do you feel that this process could have been used for students not identified as special needs?

Yes 9 No ____ Not Sure ____ No Answer ____

If not, please explain:

f. How long did it take to complete the assessment rating forms? 10 min. to 2.5 hrs. Average time: 45 min. Median 37 min.

g. Did the rating forms take a significant amount of non-classroom time?

Yes 3 No 6 Not Sure ____ No Answer ____

If yes, please indicate amount of time required:

h. If you used the assessment process for more than one class, did the time required for rating forms vary?

Yes 3 No 4 No Answer 2

If so, explain:

III. Rating Forms

a. Was the information being sought stated clearly in functional terms?

Yes 7 No ____ Not Sure 2 No Answer ____

If not, please explain:

b. Did you have prior diagnostic information (testing results) on students being observed?

Yes 1 No 8 No Answer ____

If yes, please state what information:

c. Did you have prior information from the student's I.E.P.?

Yes 1 No 7 No Answer 1

If yes, please state what information :

IV. Instrument Format

a. Please evaluate the following suggested format:

Instructions

Curriculum Analysis

	Normal Instruction	Special Instruction	Not Able To Do	Comment
Task (stated)				
Step (stated)				
Cognitive skills (defined)				
Reasoning (defined)				
Verbal (defined)				
Numerical (defined)				

	Normal Instruction	Special Instruction	Not Able to do	42. Comment
Perceptual Motor (only those that apply-listed)				
Physical Demands (only those that apply-listed)				
Interests (only those that apply-listed)				
Temperaments (only those that apply-listed)				
Specific Behaviors (only those that apply-listed)				

(Format would continue with each of the remaining steps)

APPENDIX: Definition of Characteristics

Rating: (+) 5 4 3 2 1 (-)
3 4

No Answer 2

b. In what ways would you change the format of the rating checklists?

REFERENCE LISTING OF PRODUCTS AND ACTIVITIES

.01 Survey Instrument for the Comprehensive Needs Assessment

.02 Report on the Comprehensive Needs Assessment

.03 Procedural Manual for the Vocational Assessment of Special Needs Individuals

.04 Assessment Team Inservice Package (three parts)

I. Sensitization

II. Curriculum Analysis

III. Developing Instrumentation and Collecting Information

.05 Situational Assessment Instrumentation

I. Directions, Definitions, Relationship to Occupational Clusters

II. Fine Arts: Drawing in Perspective

III. Industrial Arts: Custom Coat Hanger

IV. Industrial Arts: Three View Drawing

V. Mathematics: Metric System

VI. Music: Communication and Expression

VII. Science: Series Circuits

VIII. Social Studies: States and Capitals

.06 Proposal for Phase III Funding (continuation)

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REFERENCE LISTING OF PHASE I DOCUMENTS

Diagnostic Vocational Assessment of Special Needs Individuals: An Information Storage and Retrieval System. Division of Occupational Education, Commonwealth of Massachusetts, 1980.

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Stodden, R.A., Vocational Assessment for Special Needs Individuals: Project Final Report Phase I, Division of Occupational Education, Commonwealth of Massachusetts, 1980. (b)